

September 9, 2005

EAC RFP # 05-08 STATEMENT OF WORK AND CONTRACT TERMS

RESEARCH AND MANAGEMENT ASSISTANCE TO THE ELECTION ASSISTANCE COMMISSION TO PLAN AND ADMINISTER VOTER INFORMATION PUBLIC ACCESS PORTAL DESIGN CONFERENCE

1.0 Background. In June of 2005, staff at the U.S. Election Assistance Commission (EAC) undertook a survey of public access portals available online to determine trends in voter questions and what entities were sponsoring online portals. A voter information public access portal is defined as a Web site that disseminates voter education information. The EAC found that there were several public access portals in operation for the 2004 Presidential election, and their sponsorship ranged from locally-based, to independent sector and private corporations. Many of the portals performed the same functions for voters, and efforts were found to be duplicative, disorganized, and oftentimes erroneous. The EAC also found that voters overwhelmingly had two questions on Election Day: (1) Questions about registration, and (2) Polling place location.

Section 245(a) of the Help America Vote Act (HAVA) mandates that the U.S. Election Assistance Commission (EAC) conduct a thorough study of issues and challenges presented by incorporating communications and Internet technologies. Section 245(a)(2)(C) indicates that the EAC may investigate the impact that new communications or Internet technology systems for use in the electoral process could have on voter participation rates, voter education, and public accessibility. In addition, Section 241(b)(9) allows the EAC to periodically study election administration issues, including methods of educating voters on all aspects of participating in elections.

2.0 Objective. The EAC is seeking assistance with organizing and administering a Voter Information Public Access Portal design conference which will bring together technology experts and stakeholders to discuss voter education and Web site design. The dialogue will help inform the EAC of possible next steps as it seeks to aid the states in providing easily-accessible voter education to the broadest audience possible. The Voter Information Portal Conference is intended to result in a best practices document and recommendations for a Web site design template.

3.0 Scope. The Contractor will be responsible for arranging and managing the Voter Information Portal Conference with representatives from major stakeholder groups: election administration officials and technology experts. The conference will include the participation of election officials and technology experts to solicit their best practices and recommendations for public access portals. The Contractor is presenting a research summary paper. The Contractor is also responsible for the collection,

analysis, and reporting of information gathered at the conference and for creating a best practices document and recommendations for a Web site template.

4.0 Specific Tasks.

1. *Update the project work plan.* The Contractor shall update and deliver the Project Plan no later than ten (10) days after the contract is awarded. The plan shall describe how the Contractor will accomplish each of the project tasks, and it shall include a timeline indicating major milestones, and the staff responsible for each task. The updated Project Plan shall be formally briefed to the EAC Project Manager.
2. *Submit monthly progress reports.* The Contractor shall submit a monthly progress report within two (2) weeks of the end of each month. This report shall provide a brief summary of the activities performed and it will indicate progress against the timeline provided in the Project Plan. Any issues that could adversely affect the schedule should be identified for resolution. Budget status shall also be provided. The Contractor is responsible for submitting a hardcopy and an electronic version (sent via e-mail) of the progress reports to the EAC Project Manager.
3. *Conduct periodic briefings for the EAC.* The Contractor shall periodically meet with the EAC Project Manager to discuss research findings and work progress. The Project Plan should make allowance for this activity. The number and frequency of briefings will be determined by the Contractor's Project Manager and the EAC Project Manager as the work progresses. The Contractor may also be required to periodically brief the full Commission on their work.
4. *Summarize existing voter information public access portals and present findings in a paper.* Findings shall include a best practices and lessons learned section addressing information and services provided to voters.
 - A All reports must cover data collection methodology, data sources, and data definitions.
 - B Research, analyze, and summarize data on those localities, counties, and states that have already created voter information public access portals. Of specific interest are:
 - i Types of voter services available. Questions to be addressed include, but are not limited to:
 - a) Can voters locate sample ballots?
 - b) Are voters able to change their address online?
 - c) Are NVRA and UOCAVA forms available online?
What other types of forms are available online?
 - d) Can voters register online? Can they check their registration status or voting record online?

- e) In what languages are forms and services provided to voters on the Web sites?
 - f) Are voters able to fill out and transmit forms electronically?
 - g) Are voters able to contact elections administrators via email through the portal?
 - h) Are voters able to locate their polling place online? Does the Web site indicate what to bring to the polling place? Does the Web site include hours of operation for each polling place? Does the portal include transportation information and/or directions to each polling place?
 - i) Are there any services available on the local, countywide, or statewide voter information public access portals that are not covered by the sections above? Have any of the groups used unique methods to address voter information needs through their portals?
- ii Voter information available online.
 - a) Is candidate information available?
 - b) Is local election official contact information available online?
 - c) Does the Web site indicate what type of voting apparatus is present at each polling place? Can the voter retrieve voting instructions based on the apparatus?
 - d) Are the procedures for lodging and investigating voter complaints online?
 - e) Is there a way for citizens to volunteer to work on Election Day?
 - f) Is there a voter's guide available online? What information is contained in the voter's guide?
- iii Data Security. (Where information is not proprietary):
 - a) How often is the Web site updated?
 - b) Who updates the Web site and maintains the data?
 - c) Is data regularly backed up and stored redundantly?
 - d) What kinds of firewall and virus protection does each entity employ?
- iv Typical user information.
 - a) How many hits has each Web site received? Does the frequency of use increase near Election Day?
 - b) Who is the typical user of a voter information public access portal?
 - c) Who is the intended audience?
 - d) What are the most-utilized voter services?
 - e) What are the least-utilized voter services?
 - f) What attempts has each group made to include a wider audience?

5. *Identify a group of qualified experts who have experience in voter information public Web site design and voter education to participate in the conference.*

A The Contractor shall identify at a minimum:

- i Eight (8) Elections officials or administrators who have experience creating voter education and information materials.
- ii Three (3) Web site designers from the public, private, or independent sector who have created voter information public access portals.
 - a) A minimum of one (1) Web site designer identified who has created voter information public access portals in-house.
 - b) A minimum of one (1) Web site designer who has contracted for the creation of a voter information public access portal.
- iii Two (2) interactive Web site security experts who have experience creating secure environments for online data storage and retrieval.
- iv One (1) end-user expert who has experience creating Web utilities that are easy for people to use.
 - a) The expert shall have experience creating Web utilities for persons who are disabled, illiterate, and older; and are from rural areas, urban areas, and lower-income areas.
- v Three (3) representatives from non-governmental voter information organizations.

B The Contractor shall provide a list of the potential participants to the EAC Project Manager for approval prior to inviting them to be members.

- i The list must be submitted electronically via e-mail. It must include the name of the potential participants and a brief (1 paragraph) description of their work experience and how it relates to their participation in the conference.
- ii The list shall consist of a minimum of 28 members and a maximum of 40.
- iii The Contractor shall make an effort to include as many states, counties, and localities that have already created voter information public access portals as possible.

6. *Coordinate and implement a conference including those members identified by the EAC Project Manager and those identified through the process described in Section 4(5).*

A The Contractor shall develop an agenda for the conference. The agenda must focus on voter education best practices, identified weaknesses, and recommendations for Web site design. The

documents prepared in 4(4) shall serve as a guide to moderate further discussion.

- i Topics on the agenda shall include but are not limited to:
 - a) Recommended services to include on a voter information public access portal.
 - b) Lessons learned from current and past experience creating voter information public access portals.
 - c) Items to exclude from a public access portal and reasons for the exclusions.
 - d) Methods for collecting and updating data on the Web site.
 - e) Which voters use voter information public access portals.
 - f) Ways to address the digital divide.
 - g) Who the intended audience is.
 - h) Past attempts to reach groups that fall outside the average voter information public access portal user.
 - i) Ways to reach typically under-involved voters.
 - j) Methods of ensuring security.
 - k) Ways to emphasize low technology alternatives.
 - l) Factors that keep groups from using portals.
 - m) Costs of implementing a public access portal and methods of securing funding.
 - n) Off-the-shelf options (costs/benefits).
 - o) Methods to increase traffic to voter information public access portals.
- ii Design the format and logistics of the meetings – meeting time and place, facilitator, meeting supplies, etc., and submit to the EAC Project Manager for approval.
- iii Two weeks prior to the conference, the Contractor shall submit the list of participants and the meeting agenda to the EAC Project Manager.
- iv The Contractor will keep the EAC Project Manager informed of any changes to the list of participants and the agenda via email.
- v The Contractor shall assist the EAC in gathering the necessary information from participants to coordinate their travel arrangements to attend the meetings. All travel arrangements, including flight and hotel accommodations, shall be arranged in coordination with EAC staff. The Contractor shall assist EAC in informing participants of the travel arrangements and meeting logistics.

7. *Draft a best practices document and Web site design recommendations based on the areas of agreement and disagreement between the groups, the major concerns/observations raised by participants.* The document shall also

summarize problems and questions that were identified but not addressed in the conference.

- A The document must cover the areas of data collection methodology, data sources, and data definitions.
- B Circulate statement to all participants for feedback. Allow a maximum of two weeks for participants to provide feedback.

8. *Prepare final best practices and Web design recommendations document.*

Incorporate all participant comments into the final document as appropriate and provide all comments received in an appendix to the report.

9. *Conduct final in-person briefing to EAC.* The Contractor shall brief the Best Practices document and final recommendations to the EAC.

10. *Present findings at stakeholder summer meetings.* The Contractor shall make presentations to stakeholder meetings as specified by the EAC Project Manager. This may include such organizations as the National Association of Secretaries of State (NASS), the National Association of Election Directors (NASED), and the International Association of Clerks, Recorders, Election Officials, and Treasurers (IACREOT).

5.0 Contract Type. The contract type will be Time and Materials.

6.0 Place of Performance. The principal place of performance will be the Contractor's place of business. Meetings and occasional work efforts may also be conducted at the EAC offices. Some travel will be required.

7.0 Period of Performance. The period of performance is from the date of award to September 30, 2006.

8.0 Schedule and Deliverables.

Unless otherwise agreed with EAC Project Manager, the required document formats are Microsoft Word 2000 or above, Microsoft Project, PowerPoint, and Excel. All documents must be delivered electronically to the EAC Project Manager plus one paper copy.

1	Project Work Plan (4(1))	10 days after date of award
2	Progress Reports (4(2))	Monthly
3	Briefings (4(3))	As required
4	Summary of Existing Information (4(4))	80 days after Project Plan approval
5	Selection of Conference Participants (4(5))	80 days after Project Plan approval
6	Conduct Conference (4(6))	100 days after Project Plan approval
7	Draft Best Practices Document (4(7))	20 days after conference
8	Final Best Practices Document (4(8))	20 days after participant comments

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| 9 | Final Briefing of Recommendations to
EAC (4 (9)) | May 2006 |
| 10 | Present Findings at Stakeholder Summer
Meetings (4 (10)) | June – August 2006 |

9.0 Inspection and Acceptance Criteria. Final inspection and acceptance of all work performed, reports, and other deliverables will be performed at the offices of the EAC. The Contracting Officer's Representative will be named at the time of contract award.

10.0 Invoicing. Invoices may be submitted monthly using Standard Form 1034, Public Voucher for Purchases and Services Other Than Personal. Invoices shall be delivered to the attention of:

Ms. Diana Scott
Administrative Officer
U.S. Election Assistance Commission
1225 New York Avenue, N.W., Suite 1100
Washington D.C. 20005.

11.0 Accounting and Appropriation Data. Funding is available for this contract.

12.0 Contract Terms. The contract clauses included in this document are the provisions governing this contract. The "Purchase Order Terms and Conditions" on the back of GSA Form 300 do not apply. This form is used only for the purpose of processing contract financial data.

13.0 General Provisions.

1. *Proposal Incorporated.* The Contractor's proposal is incorporated by reference into the Statement of Work.

2. *Inspection / Acceptance.* The Contractor shall only tender for acceptance those items that conform to the requirements of this contract. The EAC reserves the right to inspect and review any services that have been tendered for acceptance. The EAC may require correction or re-performance of nonconforming services at no increase in contract price. The EAC must exercise its post-acceptance rights within ten (10) days after the defect was discovered or should have been discovered.

3. *Changes.* Changes in the terms and conditions of this contract may be made only by written agreement signed by authorized representatives of both parties.

4. *Disputes.* This contract is subject to the Contract Disputes Act of 1978, as amended (41 U.S.C. 601-613). The Contractor shall proceed diligently with

performance of services, pending final resolution of any dispute arising under the contract.

5. Excusable Delays. The Contractor shall be liable for defaults unless nonperformance is caused by an occurrence beyond the reasonable control of the Contractor and without its fault or negligence such as acts of God or the public enemy, acts of Government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, unusually severe weather, and delays of common carriers. The Contractor shall notify the EAC, in writing, as soon as possible after the beginning of an excusable delay. The Contractor shall explain the basis for the excusable delay, and correct the problem as soon as possible. The Contractor shall notify the EAC, in writing, at the end of the delay.

6. Other Compliances. The Contractor shall comply with all applicable Federal, State, and local laws, executive orders, rules and regulations applicable to its performance under this contract.

7. Compliance with Laws Unique to Government Contracts. The Contractor agrees to comply with 31 U.S.C. 1352 relating to limitations on the use of appropriated funds to influence certain Federal contracts; 18 U.S.C. 431 relating to officials not to benefit; 40 U.S.C. 327 et seq., Contract Work Hours and Safety Standards Act; 41 U.S.C. 51-58, Anti-Kickback Act of 1986; 41 U.S.C. 265 and 10 U.S.C. 2409, relating to whistle blower protections, 49 U.S.C. 40118, and 41 U.S.C. 423 relating to procurement integrity.

8. Limitation of Government Liability. In performing this contract, the Contractor is not authorized to make expenditures or incur obligations exceeding the total amount of the contract award. The Contractor is required to notify the Contracting Officer's Representative in writing when 75% of contract funding has been committed.

9. Termination for Convenience. The EAC, by written notice, may terminate this contract, in whole or in part, when it is in the best interest of the Government. If this contract is terminated, the rights, duties, and obligations of the parties, including compensation to the Contractor, shall be in accordance with Part 49 of the Federal Acquisition Regulations in effect on the date of this contract.